

Knowledge Transfer Menu Outline

1. Key contacts
 - a. Types of Contacts: e.g. Internal EPA contacts, State contacts, Intra-Regional contacts, Outside groups
 - b. Information to record: e.g. name, e-mail, phone number, preferred method of contact, importance/context of your contact
 - c. Location of contacts: e.g. mechanism of storing your contacts
2. Paper File Management
 - a. Working paper files to keep
 - i. Definition of an Agency Record, File Retention Schedule, Litigation Hold
 - ii. Active paper files: e.g. grants, permits, enforcement actions
 - iii. Other relevant paper files: e.g. trainings, conferences
 - b. Location of paper files
 - i. Records in the Records Center
 - ii. Records in Distributed Drawers
 - iii. Your active files and other relevant files
 - c. File Organization
 - i. Create a key for your active and other relevant files
 - ii. Include your program's file organization protocol for agency records
3. Electronic file management
 - a. Working electronic files to keep
 - i. Definition of an Agency Record, File Retention Schedule
 - ii. E-mail management: e.g. preserving records, archiving
 - iii. Active electronic files: e.g. templates, projects, documents, letters, etc.
 - iv. Other relevant electronic files: e.g. trainings, conferences
 - b. Location of electronic files
 - i. Records on the F, I, G, H, M, O Drives, CDs, External Hard Drives, etc.
 - ii. Personal Databases or Databases your position manages
 - iii. Your active files and other relevant files
 - c. File Organization
 - i. Create a key for your active and other relevant files
 - ii. Include your program's file organization protocol for agency records
4. Standard Operating Procedures for critical job functions
 - a. What is an SOP & why are SOPs important?
 - b. Examples: e.g. EPA program or position specific SOPs such as regional or national database management, grant management, state oversight
 - c. Location: e.g. electronic, brain book, program manual

5. Recommendations and other resources
 - a. Training: e.g. what is required and what is recommended
 - b. Websites: i.e. frequently used
 - c. Recommended points of contact: e.g. people with key knowledge, workgroups
 - d. Technical References & other relevant resource documents
6. Current and Legacy Projects
 - a. Current Projects: e.g. project management, status of grants, enforcement actions, permits, etc.
 - b. Legacy Projects: e.g. lessons learned, communication strategies, result of project, etc.
7. Historical Agency Knowledge
 - a. Recording the history of precedent setting events: e.g. projects, cases, policies, guidance documents, and/or regulations
 - i. Program/Unit/ARAShip
 - ii. Region
 - iii. Nationally
 - b. Verbally transferring the history: mentoring, cube hours, coffee hour
8. Critical Regulatory Knowledge
 - a. Examples of frequently used regulatory program knowledge: e.g. CFR citations, USC citations, FR citations, Case history, OMB circulars, policy and guidance documents
 - b. Transferring regulatory knowledge: e.g. identifying websites, frequently used citations and cases, verbally providing regulatory development background
9. Effective idea promotion
 - a. Examples of organizational savvy: e.g. how to sell an idea internally (to your supervisor or headquarters), how to work effectively with external partners (to a state, stakeholder, or community group).
 - b. Understanding the institutional hierarchy: e.g. how to brief management, formal and informal chain of command
 - c. Transferring organizational savvy and institutional knowledge: e.g. mentoring, network events, cube hours, SOPs, templates